

CALIFORNIA WORKFORCE DEVELOPMENT BOARD



MEETING NOTICE

**Thursday, August 24, 2017
10:00 a.m. to 12:00 p.m.**

Tim Rainey
Executive Director

Michael Rossi
Chair

**Tsakopoulos Library Galleria
828 I Street
Sacramento, CA 95814**

Alternate Meeting Location:

Los Angeles Area Chamber of Commerce, UNITE- LA	UC Berkeley Labor Center
350 S. Bixel St. Los Angeles, CA 90017	2521 Channing Way Berkeley, CA 94720

AGENDA

1. Welcome and Opening Remarks

2. Public Comment

3. Action Items

- [Approve Meeting Summary of March 16, 2017 \(pages 3-7\)](#)
- [Approve Local and Regional Plans \(pages 8-14\)](#)
- [Approve Local Area Modification Application adding Mendocino to the Workforce Alliance of the North Bay \(Counties of Napa, Lake, Marin\) \(page 15\)](#)

4. Updates and Discussion

- [Regional Plan Implementation \(pages 17-23\)](#)
- [Memorandum of Understanding Process / State Funding Mechanism \(pages 24-27\)](#)
- [Update on AJCC Operator and Career Services Procurement \(pages 28-29\)](#)
- [Update on AJCC Certification \(pages 30\)](#)

5. Other Business

Meeting conclusion time is an estimate; meeting may end earlier subject to completion of agenda items and/or approved motion to adjourn. In order for the State Board to provide an opportunity for interested parties to speak at the public meetings, public comment may be limited. Written comments provided to the Committee must be made available to the public, in compliance with the Bagley-Keene Open Meeting Act, §11125.1, with copies available in sufficient supply. Individuals who require accommodations for their disabilities (including interpreters and alternate formats) are requested to contact the California Workforce Development Board staff at (916) 657-1440 at least ten days prior to the meeting. TTY line: (916) 324-6523. Please visit the California Workforce Development Board website at <http://www.cwdb.ca.gov> or contact Daniel Patterson (916) 657-1446 for additional information. Meeting materials for the public will be available at the meeting location

Item 1. Welcome and Opening Remarks

Item 2. Public Comment

Item 3. Action Items

- a. Approve Meeting Summary of March 16, 2017
- b. Approve Local and Regional Plans
- c. Approve Local Area Modification adding Mendocino County to the Workforce Alliance of the North Bay (Napa, Lake, Marin Counties)

**CALIFORNIA WORKFORCE DEVELOPMENT BOARD
FULL BOARD MEETING
MARCH 16, 2017
333 BUSH STREET, 30TH FLOOR
SAN FRANCISCO, CA 94104-2834**

1. Welcome and Opening Remarks

a. Introduction of New Members

A quorum being present, Chair Mike Rossi who was unable to attend in person, convened the meeting at 10:02 a.m.

Executive Director Rainey welcomed the seven new members:

Lee Ann Eager	Nicole Rice	Charles Riojas
Fabrizio Sasso	Rebecca Miller	Gary King
Gunjan Aggarwal		

Members in Attendance:

Tom Adams for T. Torlakson	Gary King (Sac)
Gunjan Aggarwal	Teodoro Martinez for R. Salas
Josh Becker	Rebecca Miller
Robert Beitcher (LA)	Nathan Nayman
John Brauer	Van Ton-Quinlivan for E. Ortiz Oakley
Bill Camp	Diane Ravnik
Jamil Dada	Bob Redlo
Jim Suennen	Nicole Rice (Sac)
Lee Ann Eager	Charles Riojas
Marina Espinoza for K.Mullin (Sac)	Mike Rossi
Diane Factor (LA)	Alma Salazar (LA)
I. Angelov Farooq	Hermelinda Sapien
Laurence Frank (LA)	Fabrizio Sasso
Patrick Henning Jr.	Floyd Trammell
Pamela Kan	

2. Public Comment

John Howard representing Jan Vogel from the South Bay WDB regarding the EDD mandate that all local areas direct key into the CalJOBS system. He stated that while there may be no

cost to EDD for all local boards to be on CalJOBS, there is a significant cost to local boards to interface with other local programs that utilize other local systems. The mandated use of CalJOBS takes away from direct client services? Mr. Howard said the core of Human Centered Design is to be responsive and adapt systems to customer need. The CalJOBS mandate runs counter to this philosophy.

Ms. Kan asked if there is any API that can be used.

Luther Jackson representing NOVA WDB echoed John Howard's concerns. NOVA's internal proprietary system allows them to obtain immediate customer feedback via survey. CalJOBS will not allow NOVA to be as responsive to this feedback.

Catherine Daniel, deputy director of the San Francisco WDB. SFWDB is serving its customers through 57 service providers that use other systems that upload WIOA activities to CalJOBS. If SFWDB closes their API, they will ask their provider to perform double data entry at a significant cost increase. This mandate runs counter from the CWDB's move towards leveraging and data sharing.

3. Action Items

a. Approve the Meeting Minutes from December 15, 2016

A motion to approve the item was offered by Mr. Nayman and seconded by Mr. Trammell. The item was unanimously approved.

b. Approve One Stop Certification Policy

Executive Director Rainey briefed this item. Mr. Dada moved to approve the policy and Mr. Nayman seconded. The policy was unanimously approved.

c. Authorize the Executive Committee to Act on Behalf of the State Board to make recommendations to LWDA Secretary on One Stop Procurement and Adult/Dislocated Worker Career Service Providers

Executive Director Rainey briefed this item. Mr. Camp moved to approve and Mr. Dada seconded. The item was unanimously approved.

4. Updates & Discussion

Executive Director Rainey covered items a-c en bloc. Materials were included in the agenda and provided to members. Chair Rossi noted that the Accelerator materials are all positive and reminded that these projects are about taking risks and failure is ok. Deputy Director

Amy Wallace stated that further assessment and analysis of each project is being performed and that information will be available.

- a. **Workforce Accelerator Investments and Outcomes**
- b. **Forward Focus (AB2060 Recidivism Reduction) Investments and Outcomes**
- c. **Prop 39 Pre-Apprenticeship Training Pilot Investments and Outcomes**

Mr. Brauer commented on the positives of the program. Fresno's high speed rail grant was highlighted. Lee Ann Eager described the Fresno program.

Mr. Frank thanked everyone for the Prop 39 grant in Los Angeles and the transformation it has caused. The key is the commitment from the trades. Opportunities are significant with \$13 billion of additional construction work in LA County.

Diane Ravnik noted two major Prop 39 accomplishments in pre-apprenticeship. 1. Engaging underserved populations 2. Improved apprenticeship success rates.

Executive Director Rainey stated that Program Year 17/18 is the final year of Prop 39's \$3 million annual funding.

d. **CAALSkills Data Sharing Project Update**

Executive Director Rainey briefly described the project and introduced Deputy Director Dan Rounds, who provided a high level overview of the policy objectives. The following questions were asked:

- Is there is a relationship between the California Community College dashboard and Assembly Bill 2148 dashboard? Deputy Director Rounds stated they are separate projects with many similarities.
- Can the dashboard data can be accessed by all? Will the system do longitudinal tracking after training is completed? Mr. Rounds stated in theory, yes, but will depend on privacy laws and other factors. The canned reports will be available and posted on a public facing website.

Van Ton-Quinlivan complimented the State Board for its work on AB 2148 to develop a master architecture

e. **WIOA Regional/Local Planning Guidance Update**

Mr. Redlo reiterated the need for statewide master health workforce plan and consideration of health care workforce in the local and regional planning piece. He

suggested convening a group of industry leaders under the State Board to prepare for this and to provide a report and recommendations.

Chair Rossi charged Mr. Redlo to get together with Executive Director Rainey to make that happen by the June meeting.

Bill Camp suggested we look at addressing the geriatric care need for nurses who can fill a huge gap with the older population.

f. U.S. Department of Labor WIOA Implementation Assessment Results

Executive Director Rainey recognized DOL California Federal Project Officer Latha Seshadri and her report in the Agenda packet.

g. CalJOBS Directive

Executive Director Rainey reminded the board this is a discussion item and that the decision has already been made and the Directive and public comment has been received. All but 7 of 46 local boards currently direct key into CalJOBS. Mr. Henning added that the proposed federal budget would make significant funding cuts to California. California has already seen a cut of 20 percent over the last 15 years and the Trump Administration is proposing an additional 20 percent cut to DOL programs. Therefore California needs to have a single state system used by all the local workforce areas. There was a brief discussion and the following questions were asked and answered:

- Lee Ann Eager asked if there was any way for local systems to integrate with CalJOBS. Mr. Henning stated there is a way but there is a cost that is associated with maintaining that interface.
- Mr. Becker asked if the money has already been spent to build these interfaces. Mr. Henning stated there is an annual cost for the CalJOBS system.
- Mr. Nayman asked what percentage of local boards are having issues. Mr. Rainey stated 5 of 46.
- Ms. Kan stated that maintenance of the API appears to be the issue. Mr. Rainey stated there is an equity issue because CalJOBS users with direct entry can't modify their data where the API users can modify their data before uploading it to CalJOBS.
- Mr. Becker asked if there are other tools to do surveys like what Luther Jackson stated that CalJOBS would support.

Chair Rossi stated that it is interesting that this conversation continues after the decision has been made. Chair Rossi believes EDD has done the best they can to do this fairly and equitably and we should move forward.

Mr. Trammell congratulated EDD Director Patrick Henning for providing clarity and asked how we think about infrastructure training opportunities.

Mr. Redlo asked that California fight against cuts to DOL programs and also asked for clarification from San Francisco and its 57 partner entities. San Francisco stated that the 57 partners will have to duplicate data entry both into CalJOBS and the city/county system.

5. Other Business

Mr. Camp suggested the Chair and EDD look at the large number of military translators who can help the State and Local Board(s) reach out to the Muslim community.

Ms. Kan suggested widening the tent to train for what the state needs in general. Increasing awareness and appreciation of the radical changes coming in the workforce. Mr. Henning offered to work with the State Board to prepare such a presentation.

Chair Rossi spoke to the current needs for today's jobs in the different economic areas of the state. He cautioned there is no silver bullet and to not get too enthusiastic over a particular approach. Mr. Rossi stated there are 2 economies in the state and they are different.

Mr. Aggarwal asked if there are some state level things being thought about that would allow California to take advantage of defense spending increases and direct job training towards those occupations.

Chair Rossi complimented the members on the time and effort it has taken over the past 4 years of his chairmanship and adjourned the meeting at 12:03 p.m.

Action Requested:

That the Board approve WIOA Local and Regional Plans. The next step is final consideration by the Governor.

Background/Policy Criteria:

Workforce Services Division [Directive 16-07](#), issued September 16, 2016, provided Regional and Local Planning Guidance to all local areas and Regional Planning Units to prepare their 2017-2020 workforce plans. The guidance was reviewed by the Executive Committee and Board at their September 15th and September 28th meetings respectively. The local and regional plans were due to the State Board on March 15th, 2017.

What is a Regional Plan?

A Regional Plan is an action plan to develop and align strategies, goals, vision and resources among the multiple local workforce areas and partners in a given Regional Planning Unit (RPU). The RPUs were approved by the State Board and the Governor and are identified in WSD [Directive 15-17](#). The Regional Plan must be consistent with the vision and goals of the State Plan and follow the detailed Regional Planning Guidance. The substance of the Regional Plan is described at WIOA Section 106(c)(2) and 20 CFR 679.510.

What is a Local Plan?

A Local Plan is an action plan to develop, align and integrate service delivery strategies and resources among the six WIOA core programs and partners in a specific local area. The Local Plan must be consistent with the vision and goals of the State Plan and follow the detailed Local Planning Guidance. The Local Plan is described at WIOA Section 108(a), and the contents of the Local Plan are described at WIOA Section 108(b) and 20 CFR 670.560.

Relationship of State Plan/ Local Plan/ Regional Plan?

The State Plan is the controlling state policy document on workforce development. It sets the direction and serves as the conceptual map for local boards and their partners as they jointly develop the Local and Regional Plans. The Local Plan, because individuals experience the “system” through local programs, facilitates local program access within a regional architecture or framework. The Regional Plan is the regional architecture or framework. It aligns local programs with regional labor markets and industry sectors that are driving regional employment. The regional plan works within the Regional Planning units (RPU). There are 14 RPUs approved by the State Board.

Status:

All Local and Regional Plans were submitted by the March 15th deadline.

On the Local Plans:

- Upon initial review by State Board staff, EDD staff, and partners, the State Board Director informed all local boards by letter on May 1st that their Plans received “conditional approval.” This was a formality necessary to allow the CA Department of Education to move forward on its

process for selecting WIOA Title II Adult Education providers. Local boards were informed that a subsequent letter would address any needed modifications.

- On May 23, each local board was informed by letter from the State Board that either 1) its Plan was complete and would be recommend to the State Board for approval at its August meeting, or 2) that specific elements were missing or needed further work and that corrections needed to be completed by July 1st. 43 local areas were informed that further work was required. Those modifications have been made.
- All local plans now meet the requirements laid out in the Local Planning Guidance. State Board staff recommends that the Executive approve all 46 local plans.

On the regional plans:

- Upon initial review by State Board staff, EDD staff, and partners, the State Board informed the designated local board for each of the 14 Regional Planning Units by letter on June 12th that its Plan received “conditional approval.” 5 RPU were informed that the Plans required modification based on the Regional Planning Guidance, and that corrections must be complete by August 1st. All regional plans are now complete.
- State Board staff recommends that the Board approve all 14 Regional Plans
- The State Board is now working with the RPUs, through regional organizers, on developing concrete implementation plans, processes, and ultimately the realization of the Regional Plans’ goals and visions.

Materials for review:

Brief chart on Local and Regional Plan approval, organized by RPU

Summaries of the Regional and Local Plans, organized by RPU, are available below. This document is still in rough draft form:

<http://cwdb.ca.gov/wp-content/uploads/sites/43/2017/03/Summaries-Local-and-Regional-080917.pdf>

Local Plan scoring matrix based on Local Planning Guidance:

[http://www.edd.ca.gov/jobs_and_training/pubs/wsd16-07att12\(acc\).docx](http://www.edd.ca.gov/jobs_and_training/pubs/wsd16-07att12(acc).docx)

Regional Plan scoring matrix based on Regional Planning Guidance:

[http://www.edd.ca.gov/jobs_and_training/pubs/wsd16-07att13\(acc\).docx](http://www.edd.ca.gov/jobs_and_training/pubs/wsd16-07att13(acc).docx)

All Local Plans are available to view at the State Board

website: https://cwdb.ca.gov/plans_policies/local-plans-with-executive-summaries/

All Regional Plans are available to view at the State Board

website: http://cwdb.ca.gov/plans_policies/local-and-regional-plans-drafts/

Recommendation:

Approve all WIOA Local and Regional Plans

WIOA Local and Regional Plan Scoring

Local and regional plans will be assessed against the sections and elements in Attachment 3.

Regional Plan Scoring

The regional plan guide is covered in sections 2(A) through 2(J) of Attachment 3. Each section contains several elements that each regional plan must address satisfactorily. There are a total of 34 elements. The elements are scored on a 2 point scale. For the regional plan, a maximum of 68 points is possible. A minimum of 34 points is required. Plans that score below the minimum will not receive full approval. Every element must score at least a 1.

Plans that fail any of the elements (receive a 0) and therefore fail to meet the minimum points will receive “conditional” approval and will be required to address the deficiency in the specified element(s).

Plans that receive the minimum score or higher will receive full approval, provided that every element scores at least a 1.

Those plans that do not meet the minimum requirements will receive technical assistance from the California Workforce Development Board (State Board) and the Employment Development Department (EDD) Workforce Services Branch (WSB) to correct shortfalls. The goal is that ALL plans receive full approval.

Local Plan Scoring

The local plan guide is covered in sections 3(A) through 3(S) of Attachment 3. Each section contains several elements that each local plan must address satisfactorily. There are a total of 36 elements. The elements are scored on a 2 point scale. For the local plan, a maximum of 72 points is possible. The minimum of 36 points is required. Plans that score below the minimum will not receive full approval. Every element must score at least a 1.

Plans that fail any of the elements (receive a 0) and therefore fail to meet the minimum points will receive “conditional” approval and will be required to address the deficiency in the specified element(s).

Plans that receive the minimum score or higher will receive full approval, provided that every element scores at least a 1.

Those plans that do not meet the minimum requirements will receive technical assistance from the State Board and the EDD’s WSB to correct shortfalls. The goal is that ALL plans receive full approval.

Scoring Definitions

0 Points:

The plan **does not** substantively answer the element. The element contains insufficient detail and does not meet minimum requirements.

1Point:

The plan **does** substantively answer the element. The element contains the required analysis and content in sufficient detail to meet minimum requirements.

2Points:

The plan element contains detailed analysis and clearly identifies goals and/or strategies where appropriate for achieving the element and exceeds minimum requirements.

Elements that receive a 2 are model answers that the State Board would share as promising practice.

Page Limit

Local plans must not exceed 35 pages, not including attachments.

Regional plans must not exceed 35 pages, not including attachments.

Please be clear, concise, and offer a coherent narrative that explains how all the elements fit together and are informed by a strategic vision at both the local and regional levels.

The State Board and the review team are interested in plans that effectively and succinctly tell their story.

Executive Summary

The State Board strongly recommends that each local and regional plan include a 1-2 page executive summary. The executive summary should put the Local Workforce Development Area's or Regional Planning Unit's best foot forward. It will be used to promote the plan to policy makers, legislative staff, system partners, funders, the public, and other interested parties.

Regional/Local Area	Initial Score	Final Score	Passed Initial	Passed on Revision	Clarification/ Additional Information Requested ¹
Coastal Regional Planning Unit	38	40		✓	D(i), D(iii)
Santa Cruz	58	58		✓	CLEO
Santa Barbara	57	57		✓	CLEO
San Luis Obispo	65	65		✓	CLEO
Monterey	54	54	✓		None
Middle Sierra Regional Planning Unit	38	38	✓	✓	None
Mother Lode	37	39		✓	F(ii),J(i)
Humboldt Regional Planning Unit	31	37		✓	C(iii), D(i-iii), D(v), E(x)
Humboldt	41	42		✓	F(ii),CLEO
North State Regional Planning Unit	40	40	✓		None
NoRTEC	48	48	✓		None
Capital Regional Planning Unit	31	35		✓	B(iv-v), C(iii), C(iv)
Yolo	44	45		✓	J(i)
SETA	50	50	✓		None
North Central Consortium	34	40		✓	D(iv),D(v),D(vi-vii),D(viii),J(i),CLEO
Golden Sierra	39	39	✓		None
East Bay Regional Planning Unit	47	47	✓		None
Richmond	44	46		✓	D(i),J(i)
Oakland	43	46		✓	D(vi-vii),J(i),CLEO
Contra Costa	41	44		✓	D(v),D(vi-vii),CLEO
Alameda	56	56		✓	CLEO

¹ For the Regional Plans, a maximum score possible is 68. For Local Plans, the maximum score possible is 72. Any regional or local plan that received a score of "0" for any element received a "conditional" approval with the requirement to address the deficiency in the specified element(s).

Regional/Local Area	Initial Score	Final Score	Passed Initial	Passed on Revision	Clarification/ Additional Information Requested
North Bay Regional Planning Unit	37	38		✓	E(ix)
Sonoma	43	44		✓	F(ii), CLEO
Solano	54	55		✓	F(ii), CLEO
Workforce Alliance of North Bay	39	40		✓	C (iii), CLEO
Mendocino	37	39		✓	C(vi), K(i), CLEO
Bay-Peninsula Regional Planning Unit	46	46	✓		None
San Jose Silicon Valley	41	41		✓	CLEO
San Francisco	38	39		✓	A(ii), CLEO
San Benito	32	37		✓	C(i), D(i), D(iv), E(ix), J(i), CLEO
NOVA	48	48	✓		None
San Joaquin Valley Regional Planning Unit	51	51	✓		None
Tulare	57	57		✓	CLEO
Stanislaus	49	49		✓	CLEO
San Joaquin Valley	49	51		✓	E(ix), J(i), CLEO
Merced	51	53		CLEO	G(i), M-S, CLEO
Madera	48	51		CLEO	C(ii), C(iv), E(iii), CLEO
Kings	41	43		✓	E(v), K(i)
Fresno	37	40		✓	B(ii), C(i), E(ix), CLEO
Kern-Inyo-Mono (Employers' Training Resource)	41	43		CLEO	E(iv), E(v), CLEO
Southern Border	38	43		✓	B(v), E(ii-iv), E(viii)
Imperial	46	49		✓	D(vi-vii), F(ii), CLEO
San Diego	28	36		CLEO	D(iv), D(vi-vii), E(ix), F(ii), G(i), H(i), L(i), CLEO

Regional/Local Area	Initial Score	Final Score	Passed Initial	Passed on Revision	Clarification/ Additional Information Requested
Los Angeles Basin	48	48	✓		None
Verdugo	43	45		✓	C(iv),F(ii),CLEO
South Bay	51	53		✓	C(ii),F(ii),CLEO
SELACO	48	50		✓	D(iv),F(ii),CLEO
Long Beach/Gateway	41	44		CLEO	C(iii),D(v),D(viii),CLEO
Los Angeles County	51	51		✓	CLEO
Los Angeles City	38	41		✓	E(vi),F(ii),J(i),CLEO
Foothill	51	52		✓	F(ii),CLEO
Orange Regional Planning Unit	55	55	✓		None
Orange	54	54		✓	CLEO
Anaheim	38	42		✓	C(v),C(vii),D(i),F(ii),CLEO
Santa Ana	54	54		✓	CLEO
Inland Empire Regional Planning Unit	45	45	✓		None
Riverside County	48	50		✓	F(ii),G(i)
San Bernardino	39	40		✓	F(ii)
Ventura Regional Planning Unit	41	41	✓		None
Ventura	43	44		✓	F(ii)

Action Requested

That the Board approve local area modification application to add Mendocino County to the Workforce Alliance of the North Bay (Counties of Napa, Lake, Marin)

Background:

On July 24, 2017, the State Board received an application from the Workforce Alliance of the North Bay (WANB) Governing Board requesting a local area modification. The application affirms agreements between the County of Mendocino Board of Supervisors and the WANB. The WANB Governing Board and Mendocino Supervisors voted unanimously in support of the unification of these local areas.

The local area modification application was referred to the Employment Development Department (EDD) for review and analysis. EDD's recommendation is to approve the application. State Board staff agrees with EDD's analysis and supports the recommendation.

At its June 29, 2016 meeting, the State Board approved the merger of the Napa/Lake and Marin County local workforce areas to form the Workforce Alliance of the North Bay. The inclusion of Mendocino creates a more regionalized workforce area with greater influence over the strategic alignment of programs and resources with target industry sectors.

Policy Criteria:

Section 106 of the Workforce Innovation and Opportunity Act provides the Governor the authority and responsibility to designate Local Workforce Development Areas (local area). These responsibilities are also codified in the California Unemployment Insurance Code. The Workforce Alliance of the North Bay's application is consistent with the State Board's policy for requesting a local area modification as contained in Directive WIAD05-02.

Next Steps:

Upon recommendation by the full State Board and approval of the application by the Secretary of the Labor and Workforce Development Agency acting on behalf of the Governor, the local area modification will be effective immediately upon approval. EDD will take the necessary administrative actions to affect the transition. This will include such things as revision of formula funding allocations, transfer of affected participants and records, physical assets and other related administrative and programmatic functions.

Recommendation:

Approve local area modification application to add Mendocino County to the Workforce Alliance of the North Bay

Item 4. Update \ Discussion

- a. Regional Plan Implementation
- b. Memorandum of Understanding Process / State Funding Mechanism
- c. Update on AJCC Operator and Career Services Procurement
- d. Update on AJCC Certification

Item 5. Other Business

Discussion:**Regional Plan Implementation/ Regional Organizing****Why Regional Organizing is Important:**

Continue momentum towards regional leadership, identify leaders in the system who value regional collaboration, implement Regional Plans, and enhance communication between regions and the state.

What does the regional work look like in a year?

- Local boards and partners working from the same playbook to implement Regional Plans.
- Common Agenda with industry on sector initiatives and strategies informed by the State Board's "High Road" sector work. Target sectors are embraced by business and labor.
- Regional program design and funding strategies, both State and local, support regional work.
- Identification of effective best practices in productivity, efficiencies of scale, and leadership
- Alignment of Regional Plan implementation with SlingShot, Workforce Accelerator Fund, Career Pathways Trust, Strong Workforce, Adult Education Block Grant Consortia, etc

Who's involved?

- State-level leadership, modeled on WIOA Working Group, provides guidance to system partners on implementation goals and strategies. Includes the core partners as well as State Board members selected by Chairman Rossi and Secretary Lanier.
- Local Board members to coordinate regionally across local board boundaries. State Board members provide support of efforts in their regions (a rebooted "member-to-member" initiative).
- 14 Regional Organizers selected by each Regional Planning Unit to support Regional Plan implementation and coordination with other regional efforts.
- Regional Organizers receive guidance and support from the State Board through a Coordinator as well as from the local boards in each Regional Planning Unit.
- Regional Organizer Coordinator (Robin Purdy) guides and manages regional organizers. Will require additional capacity to support
- Technical Assistance Provider— California Workforce Association and others TBD

Role of Regional Organizers:

Supports the development of regional leadership and the implementation of the Regional Plans, building on the efforts of the SlingShot coalitions and coordinating with other regional efforts. Regional organizers' duties include:

1. Acting as the liaison between the State Board and regional leaders
2. Alignment of workforce, education and econ development in efforts to engage industry champions
3. Supporting ongoing dialogue between labor, business, education, community
4. Connecting State Board members with local boards members
5. Identifying related and relevant state and federal grant projects that should be coordinated
6. Attending meetings with State Board and technical assistance staff and participating in regional and statewide convening and conference calls with other regional organizers
7. Working with regional coalitions, California Workforce Association, and State Board to build capacity of local board staff and partners

Deliverables and Outcomes include:

1. Unified regional business outreach/engagement and employers as leaders and champions
2. Increased regional capacity to support alignment incorporate strategies for system alignment, upward mobility for all Californians and demand driven skill attainment
3. Increased capacity of local board staff and partners
4. Increase efficiencies and reduced duplication through regional cooperation

Regional Organizing Status Report

Regional Organizing Phase 1: Identifying Priority Goals, Developing Action Plans & Budgets

August 1, 2017

<p>The project is ON TRACK the months of 6/1/2017 - 7/31/2017, accomplishing the following:</p>	<ul style="list-style-type: none"> ● Regional Workforce Plans were reviewed, revised and submitted to California Workforce Development Board for approval (August Board meeting) ● Summary of California Regional Plan Executive Summaries published ● Regional Organizers for 14 California Regional Planning Units identified ● Regional Organizer "Blast-off" Meeting held on June 22, 2017. ● Conference calls conducted and scheduled (August – September) with Regional Organizers to review progress on identification of priority goals from regional plans and action plans to implement goals. ● Attended regional meetings of Workforce Boards in Capital Region and LA Basin Region.
<p>Issues:</p>	<ul style="list-style-type: none"> ● Change in leadership in Orange County led to delay in identifying Regional Organizer. As of August 1, Orange RPU has selected their Regional Organizer and is in contract negotiations. ● Regional Organizer responsibilities for Inland Empire and Coastal regions will be coordinated by two Regional Organizers in each region. Regional communication and coordination will continue as a priority.
<p>Milestones planned for next 2 months:</p>	<ul style="list-style-type: none"> ● White Paper on Regionalism will be drafted to inform the discussion and identify models ● Regional Organizer Training Session scheduled August 22-23 ● Webinar on Career Pathways scheduled for August 29 conducted by CLASP ● Planning for Plenary Session on Regional Organizing at Meeting of the Minds, September 5, 2017 (Tim, Robin, CWA) ● Completion of Work Plan and Budget for Regional Plan implementation by all 14 RPUs by September 22, 2017 ● Site Visits ● Establish a Community of Practice for Regional Organizers.
<p>Areas/questions for discussion:</p>	<ul style="list-style-type: none"> ● Clarify Technical Assistance plan ● Resources to support publication on Regionalism ● Administrative efficiencies – issue of regional funds contracted to local boards

RPU Updates:

LA Basin RPU:

- ✓ Identified the following five (5) priority goals from regional plan and are vetting them with Local Boards:
 - Develop a plan of action to continue to expand service and outcomes for the region's disconnected youth
 - Implement a system-wide approach to industry engagement that supports the efforts of the seven boards and all system stakeholders
 - Engage industry leaders in each priority sector to: identify skill needs; review training content; determine the value of credentials; and recommend programs to address skill needs. (alignment with SlingShot Compact)
 - Develop a framework for determining the scalability and replication potential of career pathway programs developed at the local and/or stakeholder level and a protocol for bringing such programs to scale as regional sector pathway programs.
 - Develop a communication platform for the region to promote the sharing of information throughout the workforce system.
- ✓ Conducted LA Basin RPU Regional Planning Meeting focusing on encouraging local board leadership and cooperation on achieving goals and leveraging federal, state and local funds from all system partners to achieve goals.
- ✓ Contracted with consultants who wrote the regional plan to assist Regional Organizer, local Board Directors, and partners in the development of the action plan.

North Coast RPU:

- ✓ Regional and local board are one entity (Humboldt).
- ✓ Regional Plan and SlingShot Compact are aligned.
- ✓ Preliminary Discussions on Priority Goals focus on:
 - Identifying and defining career pathways in healthcare
 - Marketing/elevating industry valued credentials in high schools to ensure that more high school graduates entering good paying jobs.
 - Apprenticeship and pre-apprenticeship: implementation of multi-craft pre-apprenticeship leading to middle skilled jobs in construction
- ✓ Conducted a series of healthcare workshops in collaboration with Strong Workforce and Adult Education for employers
- ✓ Healthcare industry workgroup is creating implementation plan for Medical Assistant pathways in healthcare sector.
- ✓ Healthcare Industry created "Humboldt Healthcare Endorsement", and industry recognized certificate for health pathways.
- ✓ Workforce Board is working with College of the Redwoods and Humboldt State University to develop a Bachelor's of Science, Nursing (BSN) curriculum.
- ✓ Plans are in the works for focus on developing MC3 Pre-Apprenticeship curriculum for construction trades.

Southern Border RPU:

- ✓ Southern Border does not yet have bi-monthly calls scheduled. Regional Organizer has participated in initial contact and attended June 22 meeting.
 - ✓ Alignment with SlingShot Compact needs to be explored
 - ✓ Preliminary Discussions on Priority Goals focus on:
 - Increasing staff's abilities through cross-training with partners and identifying their staff needs to provide targeted training for skill attainment.
 - Provide Industry focused training in the healthcare and clean energy sectors in order to provide a strong workforce and to achieve both economic growth and long term employment.
 - Grow and cement Southern Border Region partnership to pool resources and expand services to the community.
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San Joaquin Valley & Associated Counties RPU:

- ✓ Regional Organizing is building on success of Central California Workforce Collaborative (CCWC)
- ✓ Regional Memorandum of Understanding is in the final stages of development
- ✓ Preliminary Discussions on Priority Goals focus on:
 - Mapping of regional career pathways to develop a clear outline/map of regional career pathways that align with priority/in-demand sectors.
 - Streamlining workforce policies and processes on the regional or sub-regional level to achieve administrative efficiencies in procurement, AJCC Certification, and regional ETPL coordination
 - Develop a Regional toolbox to share successes and expand promising practices across the region.
- ✓ In the process of implementing a sub-regional procurement of AJCC Operator and development of AJCC Certification process for five local Boards.

Coastal RPU:

- ✓ Coastal Region will identify two Regional Organizer's (Manager from Santa Barbara County and former Director of San Luis Obispo CWDB acting as a consultant)
- ✓ Preliminary Discussions on Priority Goals focus on:
 - Develop regional MOU and identify areas where regional policies would result in administrative efficiencies and develop regional policies: monitoring, MIS, ETPL, marketing/communication, staff development and workforce research.
 - Create a regional service organization for grant writing and staffing regional initiatives.
 - Continue SlingShot focus on sector initiatives in healthcare.

Middle Sierra RPU:

- ✓ Regional and local board are one entity (Mother Lode).
- ✓ Workforce Board has mandated formation of a Strategic Planning Advisory Committee to review and implement regional plan. First meeting will be in September.
- ✓ Has developed strong regional collaboration with colleges, economic development and business. Mother Lode was recently awarded the contract to act at the Regional Economic Development Association for the Central Sierra Economic Development District.
- ✓ Preliminary Discussions on Priority Goals focus on:
 - Demand driven career pathways and partnering with economic development and education to collocate in the AJCC Business center to better align resources and improve services.
 - Focus on sectors leading to middle skills career pathways (construction, manufacturing, healthcare, leisure and hospitality; natural resources) resulting in good paying jobs that exist in the region.
 - Develop/identify an informal entity to act as an intermediary between governments, education, business, and economic development.

North State RPU:

- ✓ Regional and local board are one entity (NORTEC).
- ✓ Preliminary Discussion on Priority Goals focus on:
 - Developing/growing industry sector partnerships and incorporating rural areas into the sector work in the 5 priority sectors (Manufacturing, healthcare, Information Technology, Agriculture and Tourism) (Aligned with SlingShot Compact)
 - Increasing awareness of NORTEC local activities and services for businesses to increase regional awareness of services, partnerships, and business engagement
- ✓ August, 2017 - convening a meeting with education and business partners to Grow Manufacturing
- ✓ Released an RFP to procure intermediaries for industry sector partnerships in July, 2017.
- ✓ Meeting with all AJCCs in region to inform them about sector opportunities and provide information on demand occupations in the priority sectors.

- ✓ Alignment with SlingShot and Career Pathways Action Teams.

Orange RPU:

- ✓ Regional Organizer selected in late July, 2017. Call will be scheduled as soon as on-boarding is complete.
- ✓ Preliminary Discussion on Priority Goals focus on:
 - Grow the Orange County industry sectors of Manufacturing, Information Technology, Healthcare and Tourism to ensure Industry and business from the demand sectors are engaged and leading. (Aligned with SlingShot Compact).
 - Advance the lives of red-zone residents by growing and strengthening the OC region workforce and education partnership and leverage resources.

Inland Empire RPU:

- ✓ Staff from San Bernardino and Riverside will act as co-Regional Organizers Call scheduled August 8 at 1:00
- ✓ Preliminary Discussion on Priority Goals focus on:
 - Identify Industry champions in each of the growth sectors. (Aligned with Sling Shot Compact).
 - Develop regional decision making strategies.
 - Regional Partner Alignment

Capital Region RPU:

- ✓ Preliminary Discussion on Priority Goals focus on:
 - Alignment of partners (Strong Workforce; Align Capital Region; Adult Education) to ensure alignment of resources and build on the strengths of the partners. (Aligned with SlingShot Compact)
 - Ensure business leadership in priority sector initiatives (healthcare, construction and agriculture) by focusing on employer engagement and leadership.
 - Identifying administrative efficiencies and system alignment
- ✓ Completed cluster analysis on priority sectors—(Led by Valley Vision and funded by JP Morgan Trust)
- ✓ Align Capital Region, Workforce Boards and Community College Strong Workforce are conducting an Employer Advisory Council mapping project to identify/assess industry advisory councils in the region and identify opportunities to align/merge them to ensure better business engagement and contribution to ensure educational content is consistent with business needs.

Bay-Peninsula RPU:

- ✓ Preliminary Discussion on Priority Goals focus on:
 - Working towards a vision of bringing together leadership from all partners to achieve an understanding of the value of regionalism and increased collaboration and communication of all partners.
 - Buy-in and engagement from employers.
- ✓ Bay-Peninsula RO will undertake the drafting of a discussion paper on regionalism, including why regionalism is important in the workforce system, the value and benefit, the challenges and opportunities, and the various intensities/levels/models of regional coordination.

Ventura RPU:

- ✓ Regional and local board are one entity (Ventura County).
- ✓ Preliminary Discussion on Priority Goals focus on:
 - Continue to work with the LA Basin Workforce Boards on the SlingShot Healthcare Care Coordinator Career Pathway Project. This is an industry driven project to collaborate with education to identify career pathways and create industry driven training programs for care coordinators.

-
- Through Sector Committees, continue to work with industry and educators to focus on sector strategies to develop talent pipelines and increase industry recognized credentials.
 - Streamline the healthcare advisory groups in the region to maximize industry engagement and align educational programs to meet industry needs. The WDB Healthcare Committee members collaborated to bring the healthcare industry and educators together for an advisory summit to identify ways to align training programs with industry needs. (Ventura had their first Healthcare Advisory Summit in May with 75 people attending, a second is planned for October)
 - Expand apprenticeship in the region and create pathways to good paying jobs.
 - Research Ventura commute patterns. Ventura has a large commuting population out of the County. Some jobs they commute to are service jobs in homecare, hospitality, retail and banks. Answer the question why people are commuting out, when there are similar unfilled jobs within the County.
 - Support the WDB Clean/Green Committee in creating an identity for the region as a Green Innovation Hub.

East Bay RPU:

- ✓ Preliminary Discussion on Priority Goals focuses on:
 - Review and improve common operational practices, strategic service alignment and enhanced regional tracking.
 - Develop plan to launch six sectors in the region, including better coordination of employer services; alignment with Sling Shot Compact; developing tools for building staff capacity; and scaling of career pathways models (Earn and Learn East Bay)
 - Identify what's working in Workforce Accelerator Funds grants (ISOFT tool; 21st Century Skills Workshop) and scale what's working to improve outcomes, resources and tools for staff and customers.
- ✓ East Bay is beginning work on launching a sector partnership in the Construction Industry with a Minority Business Expo in Richmond on August 10.

North Bay RPU:

- ✓ Preliminary Discussion on Priority Goals focuses on:
 - Enhanced staff training and capacity building in the form of regular regional training for staff and partners around key topics, layer transformational and human centered design on top of transactional topics.
 - Move sector partnerships forward by increasing business engagement, broadening support from partner agencies, and ensuring that every sub-region has an industry sector partnership,
 - Continue to identify industry valued credentials within career pathways, increase alignment of career pathway programs across workforce and education, and work with economic development partners.
 - ✓ Developing North Bay Alliance, a sub-regional governance structure consisting of Napa, Lake, Marin, and Mendocino Counties.
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Discussion:

Memorandum of Understanding (MOU) Process/ State Funding Mechanism

Memorandum of Understanding (MOU) Brief

To establish a high quality delivery system and enhance collaboration amongst partner programs, the Workforce Innovation and Opportunity Act requires local boards to develop MOUs with all America's Job Center of California (AJCC) required partners present in their Local Workforce Development Area (Local Area). The MOUs serve as a functional tool as well as visionary plan for how the local board and AJCC partners work together to create a unified service delivery system that best meets the needs of shared customers.

California chose to separate the MOU development process into two distinct phases. Phase I addressed service coordination and collaboration amongst the partners and was completed June 30, 2016. Phase II will address how to sustain the unified system described in Phase I through the use of resource sharing and joint infrastructure cost funding and must be in place at the local level by September 1, 2017. **If local agreements cannot be reached by September 1, the state funding mechanism will be triggered.**

Infrastructure costs are the non-personnel costs necessary for the general operation of each comprehensive AJCC, including: rental of the facilities, utilities and maintenance, equipment (including assessment-related products and assistive technology for individuals with disabilities), technology to facilitate access to the AJCC (including technology used for the center's planning and outreach activities), and common identifier costs if decided on by the local board and AJCC partners (WIOA Joint Final Rule Section 678.700).

State Funding Mechanism

In order to establish a high quality America's Job Center of CaliforniaSM (AJCC) delivery system and enhance collaboration amongst partner programs, the Workforce Innovation and Opportunity Act (WIOA) requires Local Boards to develop Memorandums of Understanding (MOU) with all AJCC required partners present in their Local Workforce Development Area (Local Area). The expectation is that these MOUs serve as a functional tool as well as visionary plan for how the Local Board and AJCC partners will work together to create a unified service delivery system that best meets the needs of their shared customers.

The state chose to separate the MOU development process into two distinct phases. Phase I addressed service coordination and collaboration amongst the partners and was intended to be completed by June 30, 2016. Phase II will address how to sustain the unified system described in Phase I through the use of resource sharing and joint infrastructure cost funding and must be in place at the local level by **September 1, 2017**.

Phase II MOU consists of three key components:

1. Infrastructure Funding Agreement (IFA): Local operating budget that outlines the non-personnel costs that are necessary for the general operation of each AJCC, this may include: rental of the facilities, utilities and maintenance, equipment, technology to facilitate access to the AJCC, etc.
2. Applicable Career Services – Services identified in WIOA Section 134(c)(2), that are delivered by the AJCC required partners. They consist of three categories: basic career services, individualized career services, and follow up services.
3. Other System Costs – Other costs that are agreed upon by the Local Board and all AJCC partners. The other system costs budget must include a line item for applicable career services (as defined above), however inclusion of other line items is optional and up to the discretion of the Local Board and AJCC partners. Examples of what the budget may include are, the cost of other shared services commonly provided by AJCC partners to any individual such as initial intake, assessment of needs, appraisal of basic skills, identification of appropriate services to meet needs, referrals to other AJCC partners, and business services.

Although all the above mentioned components are important, the most critical is the IFA due to the fact that failure by even one of the AJCC required partners to reach consensus in a Local Area with respect to the IFA will trigger implementation of the state funding mechanism (SFM).

Under the SFM, WIOA requires the Governor and Superintendent of Public Instruction to initiate a process at the state level to determine each required AJCC partner's proportionate share and IFA contributions. In California, the California Workforce Development Board (State Board), with oversight from the Secretary of the California Labor and Workforce Development Agency (Labor Agency), shall fulfill this requirement on behalf of the Governor and Superintendent of Public Instruction.

State Funding Mechanism - Process

The SFM is required under WIOA as a last resort for when Local Boards and AJCC partners cannot reach consensus at the local level on the sharing of infrastructure costs. Once the SFM is triggered, federal guidance outlines 8 distinct steps for implementation:

- Step 1: Notice of failure to reach consensus given to the Governor/Labor Agency
- Step 2: Local negotiation materials provided to the Governor/Labor Agency
- Step 3: The Governor/Labor Agency determines one-stop center infrastructure budget(s).
- Step 4: Governor/Labor Agency establishes cost allocation methodology.
- Step 5: AJCC partners' proportionate shares are determined.
- Step 6: Governor/Labor Agency calculates statewide caps.
- Step 7: Governor/Labor Agency assesses the aggregate total of infrastructure contributions as it relates to the statewide cap.
- Step 8: Governor/Labor Agency adjusts proportionate shares.

As explained in [Workforce Services Directive WSD16-09](#), if a Local Board does not submit their MOU Phase II by September 1, 2017 they will automatically trigger the SFM and must provide detailed documentation that outlines all the work done up until that point. If this happens, the State Board intends to immediately initiate extensive technical assistance. It is permissible for the Local Board to choose to re-enter local negotiations at any point during the SFM process, therefore, if the State Board is able to assist partners in coming to a consensus at the local level, the Local Area can pull out of the SFM and revert back to a locally driven process.

State Funding Mechanism - Funding

There are several beneficial reasons for Local Areas to reach consensus at the local level and avoid triggering the SFM such as the local flexibility and autonomy that are maintained by a local level process. More importantly though, is the fact that certain funding restrictions apply when a Local Area triggers the SFM that would not apply if they were able to reach consensus at the local level.

Under the SFM, WIOA specifies the type of funds that each program can use when paying their proportionate share.

- WIOA Title I may use either administrative and/or program funds.
- WIOA Title II must be paid from local administrative funds and/or non-federal cash, in-kind, or third-party contributions.
- Carl D. Perkins must be paid from local, post-secondary administrative funds and/or non-federal cash, in-kind, or third-party contributions.
- Title V of the Older Americans Act may use either administrative and/or program funds.
- All other partners are limited to administrative funds, as appropriate.

The SFM also imposes statewide funding caps that determine the maximum amount that required partner programs can contribute toward infrastructure funding in each Local Area. In the event that more than one Local Area does not reach consensus, the aggregate of a partner's proportionate share of each IFA throughout all of the affected Local Areas is restricted by their applicable statewide funding

cap. Consequently, the statewide funding caps limit local flexibility and create uncertainty for partners in regards to how much they will be allowed to contribute toward infrastructure costs and the level of service they will be able to provide to their participants under the SFM.

Further information on types of funds and limiting percentages for each program as well as the process for determining caps can be found in [Training and Employment Guidance Letter 17-16](#).

State Funding Mechanism - Appeals

WIOA requires that a process be established for Local Areas and AJCC partners to appeal the Governor/Labor Agency's determination regarding the portion of funds each program must provide towards infrastructure costs under the SFM.

As outlined in the California Unified Strategic Workforce Development Plan, a written appeal and request for a hearing must be mailed to the State Board within 21 calendar days from the Governor/Labor Agency's infrastructure cost determination. The appellant must state the grounds for appeal and describe how the Governor/Labor Agency's infrastructure cost determination is inconsistent with proportionate share requirements, cost contribution limitations, and/or the cost contribution caps.

The appellant will then be contacted within 10 calendar days of the receipt of the appeal and a hearing date will be scheduled. In order to ensure a prompt resolution of the appeal and distribution of funds in a timely manner, the appellant will receive a written decision no later than 15 calendar days after the hearing.

Discussion:
Update on AJCC Operator and Career Services Procurement

At its March 16th meeting, the Board delegated to the Executive Committee the approval of applications from local boards that want to either operate AJCCs (one-stops) or provide WIOA Adult & Dislocated Worker Career Services, or both.

Federal law requires a firewall between the local board and AJCC operations and Career Services. But federal law also allows boards and local elected officials that want to be providers to apply to the Governor for permission.

On April 27th the Executive convened for a special meeting for action on the applications. Providers had to be approved and in place no later than July 1, 2017

AJCC Operators:

Initially, 5 local boards applied for approval to operate AJCCs. Each attempted to procure the AJCC operation but had a failed procurement. After reviewing ensure integrity of the procurement processes, staff recommended that the Exec approve the 5 applications and forward the recommendation to the Governor (via Secretary Lanier) for final approval.

The Executive also agreed that in the event that other boards had failed procurement, staff would review and make recommendations for action directly to the Secretary. Since the April Executive meeting, additional local boards had failed procurement and applied to be AJCC operators. Those applications were approved by the Secretary.

Below is the final list of local boards that are approved to operate AJCCs.

Tulare	Imperial
Monterey	Ventura
Sonoma	City of Richmond
Sacramento Employment & Training Agency	Mother Lode

Adult and Dislocated Worker Career Service Providers:

27 local boards initially applied, including the five boards that applied to be the AJCC Operator. Staff requested at the April 27th meeting that the Exec recommend conditional approval of all 27 applications and forward the recommendation to the Governor (via Secretary Lanier) for final approval. All of these applicants (with the exception of the five requesting to be AJCC Operators) have procured or were in the process of procuring the AJCC Operator, but will be providing Career Services in-house. The intent of the “conditional” approval is that the Board staff and EDD- 1) monitor closely that firewalls continue to be in place, and 2) work with each local board on transitioning over the next 2 years to regional models for provision of Career Services.

Below is the final list of local boards approved as Adult and Dislocated Worker Career Service Providers:

NOVA	Verdugo
SELACO	Golden Sierra
Foothill	Contra Costa
Kern, Inyo, Mono	Riverside County
Yolo County	San Bernardino
Santa Ana	South Bay
Madera	Kings
San Joaquin	Merced
Anaheim	Stanislaus
Solano	Mother Lode
Pacific Gateway	Ventura
Imperial	Richmond
SETA	Sonoma
Monterey	

Update on America's Job Center of California (AJCC) Certification

The date of June 30, 2017 (end of the program year), was established as the deadline for completion of the certification process. Certification of the AJCCs is a prerequisite for local AJCCs to be eligible to receive infrastructure funding (WIOA sec. 121(g)(4)).

Prior to March 16, 2017 the state's policy was to delegate the responsibility for AJCC Certification to the Local Boards and require that they describe their certification process in their WIOA Local Plan. Many Local Boards adopted the Malcolm Baldrige National Quality Award (MBNQA) Standards to certify their AJCCs. (MBNQA is an award established by the U.S. Congress to raise awareness of quality management and recognize U.S. companies that have implemented successful quality management systems).

On March 16, 2017, the California Workforce Development Board approved the California Policy on Certification of the America's Comprehensive Job Centers.

On June 9, 2017 the Employment Development Department (EDD) published the final Certification Process for Comprehensive AJCCs in Workforce Services Directive 16-20.

The timeline for all Local Boards to complete the certification of the Comprehensive AJCCs is as follows:

- September 30, 2017, Local Boards submit their AJCC certification process.
- November 1, 2017, Local Boards receive the State Board's decision on their AJCC certification process.
- December 31, 2017, Local Boards submit the Baseline Criteria Matrix and, if necessary, corrective action plans for each comprehensive AJCC.
- April 1, 2018, Local Boards with AJCCs that were deemed "not yet able to certify" must have corrected any Baseline AJCC Certification compliance issues, in line with their corrective plans, and submit an updated Baseline Criteria Matrix.
- June 30, 2018, Local Boards submit the Hallmarks of Excellence Criteria Matrix and continuous improvement plans for each comprehensive AJCC.

The State has provided training on the AJCC Certification policy and process to all Local Boards and is providing technical assistance through the California Workforce Association to support their efforts to complete their AJCC Certification. EDD Regional Advisors will communicate with Local Boards on a monthly basis to assure accountability and completion of the certification process.